


PO Admin Checklist

BUYER SETUP

This is to be completed by the PO administrators after they have received notification from the module lead in OMB that their personnel have been set up in PeopleSoft.

Each buyer needs to be identified in your business unit before they can be selected as a buyer on a purchase order.

Navigation: *Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Buyer Set Up*

1. Click the **Add a New Value** Tab.
2. Click the look up icon . Click the buyer.
3. Click **Add**.
4. Select the **Department SetID** (Business Unit).
5. Select the **Ship To SetID** (Business Unit).
6. Select the **Location SetID** (Business Unit).
7. Select the **PO Origin SetID** (Business Unit).
8. Any information keyed in here, will default into a requisition and/or purchase order. This will eliminate some keying at creation time. The information isn't locked and can be changed when the requisition or purchase order is created.
 - a. Select the Department.
 - b. Select the Ship To.
 - c. Select the Location.
 - d. Select the Origin.
 - e. Enter a phone number.
 - f. Enter a fax number.
9. **Default PO Status:** Click **Pending Approval/Approved** if the buyer does not need second approval on his/her POs. This eliminates a step when creating a requisition or purchase order.
10. Click **SAVE**. Ignore the 'Dashboard' tab.